



## NEW CLIENT QUESTIONNAIRE FOR BOOKKEEPING SERVICES

### MAIN CONTACT INFORMATION

Name:

Phone Number:

Email Address:

### COMPANY INFORMATION

Company Name:

Address:

Phone Number:

Email Address:

### QUESTIONS:

- 1) Describe your business in a few sentences.
  
- 2) What type of entity is your business? (sole proprietor, general partnership, limited partnership, LLC, C Corp, S Corp)
  
- 3) How many years have you been in business?
  
- 4) What are you monthly gross sales on average?
  
- 5) Do you have any employees and/or do you work with contractors? If so, how many?
  
- 6) Do you outsource payroll? What company do you use?
  
- 7) Do you manage or track inventory?
  
- 8) Do you report sales tax?
  
- 9) What platform do you currently use? Quickbooks, Xero, Freshbooks?
  
- 10) How do you track your books? Cash, accrual, combination?
  
- 11) How many business bank and/or credit card accounts do you have?

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12) On average, how many transactions do you have (both bank and credit card accounts)?

13) Are you current on your tax returns? When was the last time you filed taxes?

14) When was the last time you received financial statements?

15) When was the last time your books were closed?

16) How do you prepare your invoices and pay your bills?

17) How often do you need to review financial reports?

Daily Weekly Biweekly Monthly Quarterly Annually

Notes:

18) What type of activities are you engaged in, in which you are not sure whether you should be collecting sales tax?

19) Do you track income and expenses by a specific segment/location/division of your business?

20) Do you track or want to track all direct expenses related to a customer/ job?

21) Do you have a budget? And how often do you monitor your actual vs. budget reports?

22) Do you pay any sales commissions?

23) Do you pay any other performance bonuses based on financial results?